

# STARTING A PLANNED GIVING PROGRAM WPGC

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- Large shop
- Office of Gift Planning
  - Reactive (service)
    - Gift Planning training for UWF staff
  - Proactive (new qualification)
    - Maintain active portfolio of gift planning specific prospects

# Lessons Learned

- Identify your best gift planning prospects
  - Age 50+
  - Consistent donors of 7 out of past 10 years
  - Deferred gift already recorded
  - Indicated a planned giving interest
- Form, execute, and track a communication strategy for your top prospects
  - (e.g. annual communication, develop prospect plans, have a purpose for each contact)

# Lessons Learned

- Obtain commitment from your board for a strong Gift Planning program
  - Low ROI in the first few years
- Gift Planning requires patience!
  - Average of 3.5 years from first contact to documented gift
- Develop a strong recognition and stewardship program early

# Take-Away Thoughts

- Focus on bequests
  - 75% of gift planning dollars are from bequests
- Include bequest language in all publications
- Share donor testimonials in written and verbal communications
- Show specific impact of realized planned gifts

# Thank You!

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